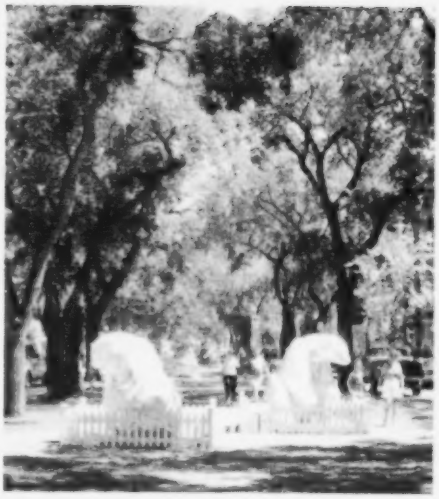
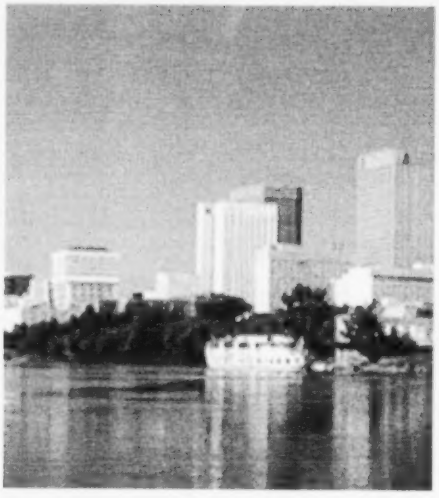
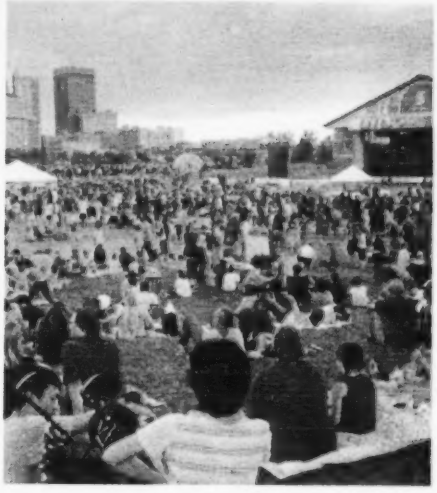






winnipeg

a downtown view

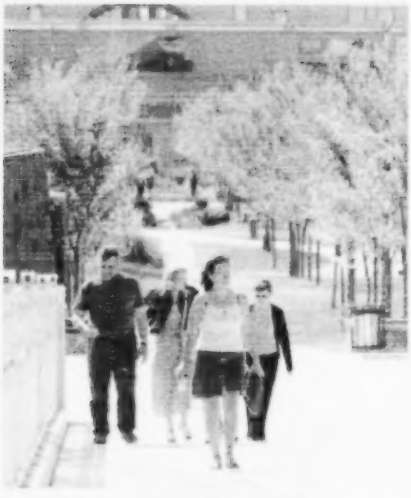
2008-05186/

Introduction

Located at the junction of the Red and Assiniboine Rivers, at roughly the geographic centre of North America, the City of Winnipeg features a highly diverse economy based on major manufacturing, financial and insurance offices and an emerging economy based on cultural industries. Winnipeg is an ethnically diverse community, which features the greatest concentration of French speaking residents west of Quebec and the largest urban Aboriginal population in Canada. Winnipeg possesses more than 60% of Manitoba's population, drives the provincial economy, and is the core of its "Spirited Energy."

At the heart of Winnipeg is our downtown, which boasts heritage architecture with parks and natural areas along the waterfront. In recent years a number of high-profile construction projects representing office, residential, institutional and entertainment uses have generated renewed interest in downtown investment.

This report is intended to aid the citizens of Winnipeg in learning about, understanding and measuring the change that is taking place in our downtown. Demographic and business development activity will be tracked over time in order to identify trends, opportunities and obstacles to a renewed downtown.



Downtown Neighbourhoods

Downtown Winnipeg features a relatively large land area for a city of roughly 700,000 citizens. As a result, downtown Winnipeg is comprised of a number of diverse neighbourhoods each with their own unique character and attributes. Distinct neighbourhoods and character areas in downtown Winnipeg include:

- The Forks, featuring a public market, shops, restaurants, a skateboard park, a riverwalk and historic port;
- The Exchange District, recognized as a National Historic Site for its collection of turn-of-the-century architecture;
- Chinatown, just north of City Hall;
- Waterfront Drive, connecting old and new along the new Red River parkway;
- Central Park, a dense, diverse residential community and green space;
- City Hall and the provincial Legislature; and the
- Broadway-Assiniboine commercial and residential neighbourhood.

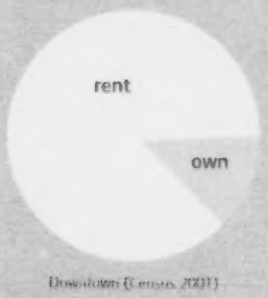
New Housing Units Downtown

The movement towards living downtown continues to gain momentum. Since 2002 approximately 385 new and refurbished residential units have been developed downtown, with a further 200 units planned or currently under construction. To complement well-established residential neighbourhoods such as Central Park and Broadway-Assiniboine, strong residential clusters are emerging along both Waterfront Drive and Princess Street in the Exchange District. New units offer a variety of housing choices including upscale living along Waterfront Drive, innovative loft conversions in the Exchange, and assisted living options for seniors around Central Park. Projects such as The Excelsior, The Strand, Sky and Ship Street Village are introducing new concepts into the housing market while loft conversions such as 181 Bannatyne, 283 Bannatyne, the Fairchild Lofts, 110 Princess and the Lindsay Building have proven themselves to be innovators in the area of adaptive reuse.

DOWNTOWN HOUSING: NEW CONDO/RENTAL

	address	# units	type	date
completed	123 Princess	7	condo	2002
	228 Notre Dame	45	rental	2003
	87/89 Princess	14	condo	2003
	283 Bannatyne Phase I	8	condo	2004
	181 Bannatyne	20	condo	2005
	375 Kennedy (near Qu'Appelle)	18	rental	2005
	520 Portage	12	condo	2005
	404 Qu'Appelle	28	rental	2005
	443 Webb Place	7	condo	2006
	TOTAL 159			
committed/underway	283 Bannatyne Phase II	8	condo	2006
	611 Main	8	rental artist live/work	2006
	234 Portage	1	condo	2006
	110 Princess	66	condo	2006
	123 Princess	1	condo	2006
	230 Princess	30	condo rough shell	2006
	435 Cumberland	42	seniors	2006
	289 Garry	4	condo	2007
	448 Hargrave	6	rental	2007
	TOTAL 226			
waterfront drive	Ship Street Village	8	condo	2006
		24	condo	2006
	Excelsior	24	condo	2007
	The Strand	15	condo	
	Sky Waterfront	100	condo	
		35	condo	
	TOTAL 206			
	TOTAL 591	2002		7
		2003		59
		2004		8
		2005		78
		2006		210
		2007		194
		2008		35

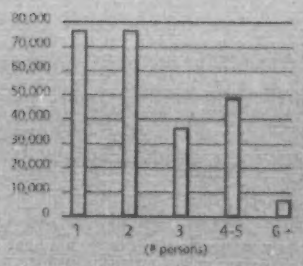
HOUSING TENURE



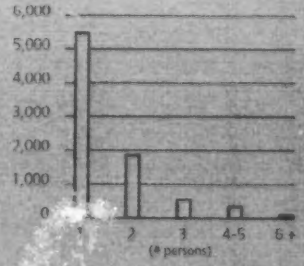
Downtown (Census 2001)

City of Winnipeg (Census 2001)

HOUSEHOLD SIZE



City of Winnipeg (Census 2001)



Downtown (Census 2001)

Population

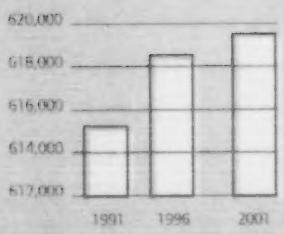
Downtown Winnipeg is home to approximately 13,000 residents. Compared to the overall population of Winnipeg, residents of downtown Winnipeg are younger, more ethnically diverse, less affluent and more likely to be single.

Downtown Winnipeg has also attracted an above average proportion of senior citizens (15.5% of downtown residents are 65 years of age and over, compared to 13.3% overall) due in part to the amenities and support services found in the neighbourhood.

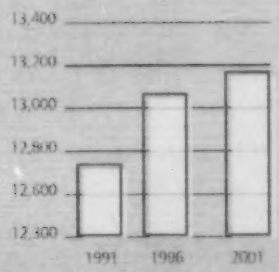
While the downtown population has declined over the last decade (3% between 1986 and 1991), recent construction activity, including loft conversions (both rental and condominium units) and new construction in the Exchange District, should result in a greater downtown population.

Downtown Winnipeg is considerably more ethnically diverse than Winnipeg as a whole. Residents of downtown Winnipeg are more likely to represent a visible minority, identify themselves as Aboriginal and speak a language other than English or French. For example, visible minorities constitute 27.6% of the population downtown – more than double the city average of 13.4%. Approximately 12.9% of downtown residents identify themselves as Aboriginal, which is approximately 50% higher than the citywide average. And 38.9% of downtown Winnipeg residents are able to speak a language other than English or French. These characteristics help to make the downtown culturally unique and diverse when compared to the rest of the city.

POPULATION 1991-2001

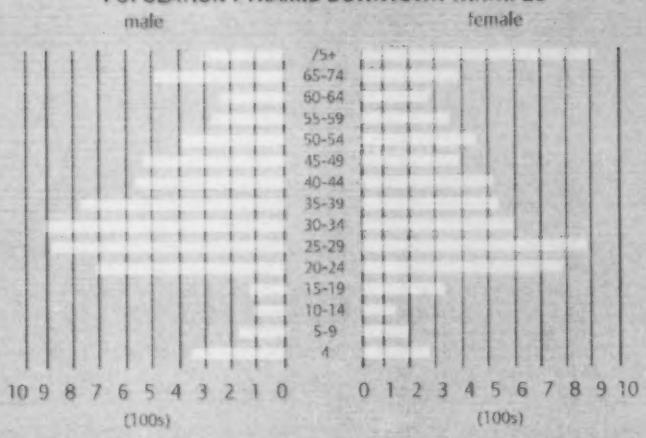


City of Winnipeg (Census 2001)



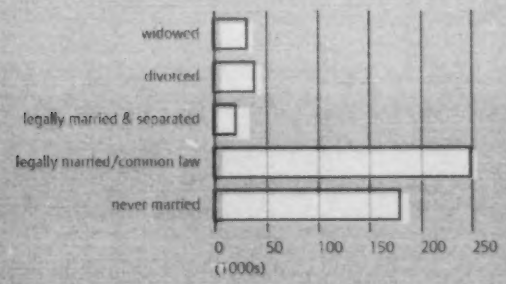
Downtown (Census 2001)

POPULATION PYRAMID DOWNTOWN WINNIPEG

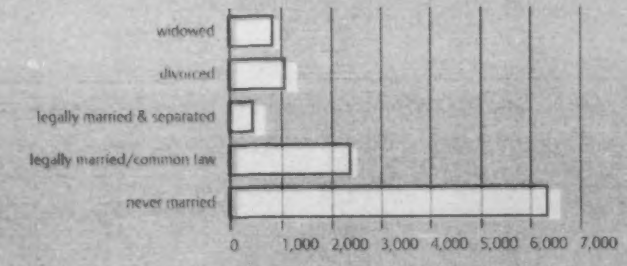


Census 2001

MARITAL STATUS



City of Winnipeg (Census 2001)



Downtown (Census 2001)

Employment

According to Manitoba Business magazine, downtown Winnipeg is home to five of the top ten Manitoba employers. Collectively, these companies employ just under 11,000 staff at various locations (both in downtown Winnipeg and throughout the province) and in key sectors including finance, insurance, energy and retail. In the coming months Manitoba Hydro, CTV and Revenue Canada will all add several thousand new employees to the downtown community.

rank	company	total # of employees*	business type
1	Great-Life West Lifeco Inc.	3000	Financial Services Holding Company
5	Agricore United	891	Agriculture
6	Manitoba Hydro	6000	Energy
7	IGM Financial	1075	Financial Planning and Investment
13	The North West Company	1474	Retail
20	Manitoba Lotteries Corporations	1800	Gaming
10	James Richardson & Sons	1842	Property and Casualty Insurance

*Not all employees are located downtown.
*Source: Manitoba Business Magazine

STUDENT ENROLMENT

City of Winnipeg (Census 2001)

Downtown (Census 2001)

attending school full-time

attending school part-time

not attending school

Education

In 2005, there were approximately 13,000 students enrolled in institutions of higher education in downtown Winnipeg.

Downtown Winnipeg is home to the University of Winnipeg's main campus on Portage Avenue, the University of Winnipeg Division of Continuing Education in the Exchange District, the University of Manitoba Downtown Aboriginal Education Centre and Red River College's Princess Street Campus. Specialized educational training can also be found at the Aboriginal Community Campus, the Winnipeg Adult Education Centre, William and Catherine Booth College and Yellowquill College.

Estimated Student Enrolments - 2005

Aboriginal Community Campus
650 students

Neeginan Institute of Applied Technology
150 students

Red River College Princess Campus
1400 students

William & Catherine Booth College
500 students

University of Winnipeg
9000 students

Winnipeg Adult Education Centre
900 students

Yellowquill College
130 students

The Office Market

In 2005, Class A vacancy rates stood at 8.7% with net rents remaining stable at $15 – $16 per square foot. The vacancy rate is down slightly from 9.2% in 2004. Vacancy rates are projected to remain stable into 2007 and average approximately 9%.

The vacancy rate for Class B office space was 9.5% in 2005, up slightly from 2004. The increase in vacancy is due in part to the construction of two projects, the Credit Union Central Building at 317 Donald Street and the Prairie Kennedoch Frohlinger law offices at 240 Kennedy Street. Average net rental rates range from $6 to $9 per square foot.

Vacancy rates for Class C office space declined from 10.8% to 9.7% in 2005, as businesses continue to be attracted to renovated character properties in the Exchange District. Overall, net rents for Class C space is between $4 to $5 per square foot.

The Retail Market

Shopping in downtown Winnipeg is focused around six clusters - Portage Place, cityplace, and Winnipeg Square shopping centres, fresh food and tourist-oriented merchandise at The Forks Market and open-air shopping along Portage Avenue and in the Exchange District. In 2005, Portage Place saw its lowest vacancy level (5%) in more than a decade due in part to the reopening of the skywalk through MTS Centre. The increased popularity of downtown shopping was also seen in a 2005 survey conducted by the Downtown Winnipeg BIZ in which all retailers surveyed reported an increase in the number of shoppers patronizing their establishments.

On Portage Avenue, an analysis of retail storefronts indicates that 67 of 84 retail storefronts were occupied, resulting in a vacancy rate of approximately 20%.

The Residential Market

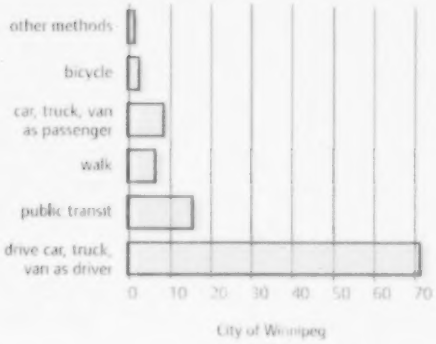
According to the 2001 Census, there are 8,320 occupied private dwellings in downtown Winnipeg. The vast majority of these dwellings are found in multi-tenant buildings, with only 45 detached houses located downtown. Approximately 53% of downtown residents rent their homes, while the remaining 47% own their units. The housing stock downtown is slightly newer when compared to the entire city, as half of all dwelling units downtown were constructed before 1960 compared to 59% for the city as a whole.

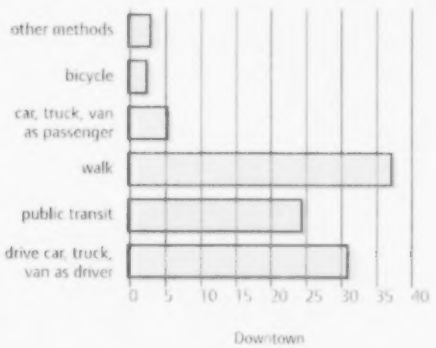
Downtown housing units are in fairly good condition with 74.2% of all units needing only regular maintenance and 6.6% requiring major repairs. In 2005, the City of Winnipeg facilitated the establishment and rehabilitation of 380 affordable housing units through the Tri-level Winnipeg Housing and Homelessness Initiative and other programs.

JUNE CLASS A-C DOWNTOWN OFFICE SPACE
VACANCY RATE SUMMARY

year	class a	class a	class a	overall
1997	3.2%	8.4%	15.9%	8.1%
1998	1.2%	6.1%	8.5%	4.9%
1999	1.9%	3.0%	6.3%	3.4%
2000	4.9%	3.8%	3.8%	4.2%
2001	9.2%	4.7%	2.1%	5.6%
2002	5.5%	4.8%	1.9%	4.4%
2003	6.2%	5.0%	3.1%	5.1%
2004	8.1%	3.2%	3.6%	4.8%
2005	7.9%	5.9%	4.4%	6.2%

MODE OF TRANSPORTATION





Transportation

Residents of downtown Winnipeg are less likely to drive to work than the citywide average. While only 6.2% of Winnipeggers walk to work, 36.2% of downtown residents indicate that they travel to work on foot. As well, approximately 24% of downtown residents report that they use public transit to get to work – almost twice the citywide rate of 14%. Downtown residents are also less likely to drive to work, as only 30% drive to work compared to 69% of those in the city at large.

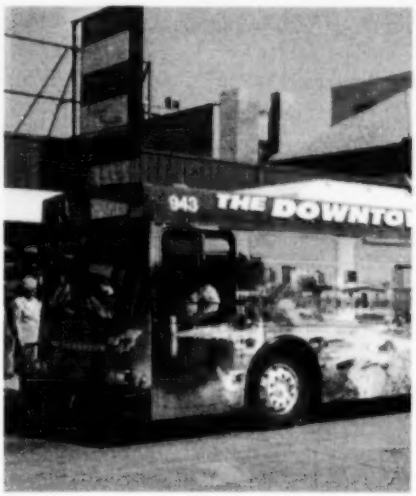
Winnipeg Transit provides service at 178 regular bus stops downtown, with additional stops serving the free Downtown Spirit shuttle. In the period between November 2004 and April 2005, Winnipeg Transit indicates that 91,000 scheduled trips were made into the downtown. On an average weekday approximately 54,000 passengers disembarked downtown. Transit passengers decrease on weekends to 23,000 and 12,000 for Saturday and Sunday respectively.Getting around downtown is also made easier with the Designated Weather Protected Walkway System, which stretches 1.9 km through downtown Winnipeg and connects 38 buildings.

Downtown districts are served seasonally by the River Spirit water taxi service. During summer months the River Spirit makes regular stops at 9 docks on both the Red and Assiniboine Rivers.

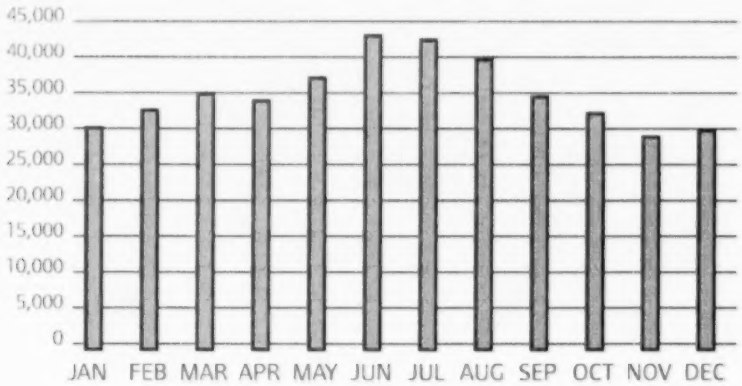
There are over 7,000 parking stalls within a five minute walk of the MTS Centre, including 2,270 stalls that are indoors and/or heated.

In 2005, the Winnipeg Parking Authority (WPA) became the special operating agency of the City of Winnipeg with a mandate to manage all city-owned parking facilities downtown, including three parkades and close to 2500 on-street stalls.

Parking rates in downtown Winnipeg rage from approximately $80/month for an outdoor surface lot to $150/month for heated indoor parking.



SPIRIT BUS USE 2005



Downtown Winnipeg has experienced a reduction of criminal code offences since 2003.

Crimes against people and property in the downtown have declined significantly since 2003. A December 2005 survey conducted for the Downtown Winnipeg BIZ by Probe Research indicated that 30% of respondents reported feeling safe downtown, up from 27% in 2003.

The same survey found that although 98% of respondents indicated that they had visited downtown, safety was a concern for 28% of women and 14% of men. When asked specifically about Portage Avenue, 66% of women and 67% of those aged 55 years and over agreed that an "increase in police and security" would encourage them to visit more regularly.

RIVER WALKWAY SYSTEM
& SELECTED PARKS

Quality of the Public Environment

Within the downtown, there are approximately 37 hectares of parks and open spaces at 42 different sites. This includes both designated parks and undesignated open spaces.

In 2001, Winnipeg became the first city in Canada to adopt a Universal Design Policy. Projects including MTS Centre, Red River College's Princess Street campus, the Provencher Bridge and Esplanade Riel incorporate universal design concepts.

In 2005, Probe Research conducted two city-wide surveys, sampling approximately 600 Winnipeggers in each, and asked Winnipeg adults about their perceptions and visitation patterns of the city's downtown. Overall, those surveyed had visited the downtown 10.8 times within the past 30 days. As well, more than half of Winnipeggers indicated that downtown is changing for the better.

The second survey asked respondents to identify the most exciting development and attraction. 31% of respondents identified The Forks as the most exciting attraction and 60% indicated that MTS Centre was the most exciting development.

In 2005, Winnipeg won their third National Communities in Bloom Award, given to cities for their efforts in beautification.

In 2005, the City of Winnipeg and volunteer groups developed a beautification strategy for Downtown that included:

- Hanging flower baskets;
- Decorating streetlights;
- Christmas tree lights;
- 10,000 flowers planted;
- 80 jumbo flower baskets; and
- 50 banners.

Tourism, Entertainment and Events

In 2004, 2.7 million visitors generated $523 million in direct visitor spending. In 2005, Winnipeg secured 170 future meetings and conventions for 2005-2010. This activity represents 48,000 delegates with an estimated spending level of over $40 million. In 2005, the Juno Awards provided an estimated economic impact of $5.5 million to the provincial economy.

In downtown Winnipeg, approximately 3,000 hotel rooms provide employment for close to 1,000 people in the accommodation services sector.

In 2005 Destination Winnipeg introduced a new Winnipeg Events Guide, published three times a year. Destination Winnipeg distributes over 700,000 promotional materials and handles 80,000 inquiries annually through their Portage Avenue office. In 2005, 638 group tours were tracked through the city with an estimated attendance of 20,000 and an economic impact of $5 million.

Downtown Winnipeg is well known as the cultural and entertainment hub of Winnipeg. Every year hundreds of thousands of visitors take in cultural, sporting and other entertainment events throughout downtown. With its many theatre spaces and other cultural venues, downtown Winnipeg is home to a variety of sports and entertainment events.

Downtown Winnipeg's appeal was boosted by the completion of MTS Centre, a multi-purpose arena built through a $134 million public-private partnership. MTS Centre is home to the Manitoba Moose hockey club and hosts a variety of events year-round. In its first year of operation over one million visitors attended concerts, sporting events and other attractions.

In 2005, the Northern League's Winnipeg Goldeyes baseball team attracted 322,758 fans over 47 games, for an average of 6,867 per game.

Many patrons are also attracted to downtown Winnipeg to attend cultural events representing music, theatre, dance and the visual arts. Institutions such as the Manitoba Opera, the Winnipeg Symphony Orchestra and the Royal Winnipeg Ballet are proud to call downtown home. In addition to these organizations, thousands come downtown to experience and participate in festivals and special events such as the Winnipeg International Children's Festival, Scotiabank Summer Concert Series at The Forks, the Jazz Winnipeg Festival and the Winnipeg Fringe Theatre Festival.

ORGANIZATIONS IN DOWNTOWN WINNIPEG

organization	year	attendance
Cinematheque	2005/2006	16,546
IMAX Theatre at Portage Place	2005/2006	118,146
Jazz Winnipeg Festival	2005/2006	35,000
Manitoba Children's Museum	2005/2006	121,000
Manitoba Moose	2005/2006	323,144
Manitoba Museum	2005/2006	300,000
Manitoba Opera	2005/2006	14,211
Manitoba Theatre Centre	2005/2006	117,910
Manitoba Theatre for Young People	2005/2006	53,193
MTS Centre	2005-Present	2,461,160
Pantages Playhouse Theatre	2005/2006	60,731
Plug In Gallery	2005/2006	31,000
Prairie Theatre Exchange	2005/2006	35,263
Royal Winnipeg Ballet	2005/2006	35,125
The Forks	2005/2006	4,000,000
Warehouse Theatre	2005/2006	15,850
Winnipeg Art Gallery	2005/2006	60,693
Winnipeg Centennial Concert Hall	2005/2006	193,886
Winnipeg Fringe Theatre Festival	2006	69,300
Winnipeg Goldeyes	2005/2006	317,485
Winnipeg International Children's Festival	2005/2006	22,000
Winnipeg Symphony	2005/2006	75,000

* All information provided by listed organizations.

Bears on Broadway was one of the most successful tourist attractions in the downtown in 2005

Visitors converged on downtown Winnipeg in record numbers in large part due to the Bears on Broadway exhibit. Featuring 63 bears along Broadway, between Main and Osborne Streets, Bears on Broadway earned $534,000 in net proceeds for CancerCare Manitoba. Bears on Broadway was named as the top tourism destination in Manitoba by Where Magazine and one of the top ten in Canada in 2005 . 71 artists from around Manitoba designed the Bears, each weighing 8000 pounds and standing seven feet tall.

downtownview

Information Sources

Probe Research Inc. - City-Wide Omnibus Survey, conducted for the Downtown Biz, 2005

Winnipeg Annual Report Police Services 2004, 2005

Avison Young Real Estate Forecast-Winnipeg Market, Forecast 2006

Access Advisory Committee, Annual Report 2005 City of Winnipeg

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Winnipeg Building Permits Summary, December 2005

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The Winnipeg Parking Authority. http://theparkingstore.winnipeg.ca/theparkingstore/

Winnipeg Transit. http://www.winnipegtransit.com/main/

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Canadian Real Estate Forecast 2005/2006 Colliers International

Winnipeggers Speak Out on City's Image, Best Attractions and Features http://www.destinationwinnipeg.ca/media_rr_display.php?NewsID=00051

Conclusion

This report presents an initial attempt at measuring change in the downtown and providing a baseline against which future data sets can be compared. However, basic conclusions may also be drawn. There are clearly significant areas of strength in Winnipeg's downtown. Most apparent is that the construction of offices, entertainment and housing is proceeding at a pace not seen in decades. The range of housing options in downtown in particular is considerable and downtown living is becoming more appealing. Waterfront Drive adds a new and exciting element to the mix.

Performing arts centres and many festivals have made downtown a key destination. The addition of MTS Centre has strengthened downtown's role as the entertainment hub of the city. A record number of conventions and other bookings are expected to inject tens of millions of dollars into the local economy over the next few years. Again, we will be tracking this data in future reports.

Trends noted in this report demonstrate that progress continues to be made towards achieving the objectives supported by Plan Winnipeg and CentreVenture, namely, putting downtown first, having more people living and working downtown, increasing the value of downtown properties, and redeveloping under-utilized properties.

However, there is clearly still need for improvement. While rates of property crime have dropped, the decrease is small. Surveys indicate that many visitors still feel that downtown is not a safe place, and that high-traffic areas such as Portage Avenue would benefit from more of a police presence.

As well, while access to waterfront areas and The Forks have injected much-needed accessible green space to our downtown, too many downtown neighbourhoods suffer from a lack of green space. The demands for both market-oriented and affordable housing must be balanced, as the best downtowns provide opportunities and amenities for all.

This report was made possible with support of: